



Board of  
Examiners

December 2003

# Update

## 2003 Baldrige Award Recipients

On November 25, 2003, President George W. Bush and Commerce Secretary Donald Evans announced seven recipients of the 2003 Malcolm Baldrige National Quality Award (MBNQA). This is the largest number of Baldrige recipients since the Program started and the first time that recipients were named in all five Baldrige Award categories.

The 2003 Baldrige Award recipients are Medrad, Inc., Indianola, Pennsylvania (manufacturing category); Boeing Aerospace Support, St. Louis, Missouri, and Caterpillar Financial Services Corporation, Nashville, Tennessee (service category); Stoner Inc., Quarryville, Pennsylvania (small business category); Baptist Hospital, Inc., Pensacola, Florida, and Saint Luke's Hospital of Kansas City, Kansas City, Missouri (health care category); and Community Consolidated School District 15, Palatine, Illinois (education category).

In joining President Bush to congratulate this year's recipients, Secretary Evans said, in part, "They represent America's best and are setting a high standard for corporate and social responsibility. Their dynamic, principled leadership has built our economy into the world's largest engine of progress and prosperity."

More information on the 2003 Baldrige Award recipients is available on our Web site at [www.baldrige.nist.gov](http://www.baldrige.nist.gov), or you may call 301-975-2036.

## New Option for Submitting 2004 Baldrige Award Applications

For the first time, applications for the Baldrige Award may be submitted electronically in 2004. In prior years, applicants were required to submit 25 paper copies of the application. In 2004, applicants have the option of submitting the application on a CD in PDF format. The content and formatting requirements are the same for paper or electronic submission. Applications submitted on CD must be accompanied by an additional processing fee of \$1,250 to cover the expense of printing and binding the 25 copies required for the evaluation. The applications submitted on CD must be postmarked no later than May 13, 2004. The due date for paper applications is May 27, 2004.

Details on this new option, as well as the requirements, forms, and instructions for applying, are contained in the 2004 Baldrige Award Application Forms booklet, which will be available both on-line and in hard copy starting in early January. The PDF version of the entire booklet and a Microsoft Word 6.0 version of the required forms for

the 2004 Award cycle will be available on our Web site at [www.baldrige.nist.gov/Award\\_Application.htm](http://www.baldrige.nist.gov/Award_Application.htm). To request a paper copy of the Baldrige Award Application Forms booklet, please contact the Baldrige National Quality Program (BNQP) via e-mail at [nqp@nist.gov](mailto:nqp@nist.gov) or by phone at 301-975-2036.

## 2004 Examiner Application is On-Line

As you may already know, we are currently accepting Examiner applications via the World Wide Web. In early November, the 2003 board members and other applicants should have received by e-mail a PIN and password that they may use to access last year's application data. These individuals may update or correct the information, accessing it as many times as necessary until they formally submit their 2004 on-line Examiner application. They should not create a new record for their information. If you have not yet received your PIN and password, please contact Pat Hilton at [patricia.hilton@nist.gov](mailto:patricia.hilton@nist.gov).

We encourage everyone to carefully review the instructions provided in the e-mail, intended to avoid the need for requesting assistance; they answer many of the common questions regarding the on-line application. Additional instructions also are provided on each page of the on-line application, and on-line technical assistance is available for Examiners simply by sending questions through the ApplyYourself system. One final caution: please be careful when entering your data. Accuracy is critical to the application process, and only you know the specific details of your knowledge and experience.

For those who do not wish to submit their information on-line, the PDF and Word versions of the application will be available as in years past for downloading at [www.baldrige.nist.gov/Examiner\\_Application.htm](http://www.baldrige.nist.gov/Examiner_Application.htm) even though the Examiner application booklet will not be printed this year.

The 2004 Examiner application will be available until January 5, 2004. The on-line version must be submitted by January 5, and paper copies must be postmarked no later than January 5 as well. Applications from new Examiners must include two recommendations. However, individuals who have previously served as Examiners do not need to submit recommendations.

We have a toll-free hot line (877-237-9064) where you may call for further information on applying for the 2004 Board of Examiners.

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## **Guaranteed Seat on the Board of Examiners for Early 2004 Award Eligibility Applicants**

In an effort to improve organizations' understanding of the Baldrige Criteria for Performance Excellence, BNQP is offering a seat on the 2004 Board of Examiners to a senior member of any organization that submits an Eligibility Certification Package early in the eligibility phase of the Award process. Although the official deadline for submission of Eligibility Certification Packages is April 13, 2004, this offer is limited to organizations submitting their packages no later than March 12, 2004. For information on the roles and responsibilities of Baldrige Examiners and applying for the 2004 board, you may call the following toll-free phone number: 877-237-9064. The 2004 Baldrige Award Application Forms booklet will be available in early January 2004 on the Baldrige Web site at [www.baldrige.nist.gov/Award\\_Application.htm](http://www.baldrige.nist.gov/Award_Application.htm) or by calling 301-975-2036.

## **Change in Alumni Role**

In 1999, BNQP started the Alumni Examiner Program. The purpose of this program was to allow experienced Examiners to receive training on the current Criteria and to serve as a swing pool in the event that the number of applications exceeded the board's ability to evaluate all applications. As originally designed, any Examiner who had served four years on the board could apply to be an Alumni Examiner.

During the 2004 Award cycle, the length of service required to serve as Alumni Examiners will be extended: the Alumni role will be reserved for those Examiners who have already served the maximum **six** years on the board and are no longer eligible to apply for membership to the Board of Examiners. These six-year Examiners will receive an invitation to serve as Alumni in early January. Former members of the Panel of Judges also will receive an invitation to serve as Alumni Examiners.

If you are a past Examiner and have not served six years on the board, we invite you to apply for membership on the 2004 Board of Examiners before the January 5th deadline—even if you have served as an Alumni Examiner in the past.

## **2004 Criteria Stable; Changes in Other Criteria Booklet Sections**

For 2004, the Criteria for Performance Excellence and Item Notes remain the same as in 2003, without change. However, there have been other significant changes in the Criteria booklet that are summarized as follows. The Scoring System description and the Scoring Guidelines

have been rewritten and redesigned. The Category and Item Descriptions section has been expanded to include the Organizational Profile. An Index of Key Terms has been added to the Criteria booklet. "Ethical behavior," "learning," and "segment" have been added to the Glossary of Key Terms. Minor wording improvements have been made in sections of the Criteria booklet other than the actual Criteria Items and Item Notes.

Changes to the Scoring System and Scoring Guidelines for 2004 are as follows. Items in Criteria Categories 1-6 are now designated as "Process" Items, evaluated on four factors: Approach, Deployment, Learning, and Integration (A-D-L-I). This change emphasizes that, beyond establishing an approach and deploying it, high-performing organizations focus on process and organizational improvement (learning) and process integration with other organizational imperatives. This may be viewed as an updated Plan-Do-Check-Act (P-D-C-A) or Plan-Do-Study-Act (P-D-S-A) cycle. Each scoring range for Process Items has achievement level descriptors for A-D-L-I. An Item score is based on a holistic view, not a checklist, of the organization's achievement level across all four factors. Each scoring range for Results Items also considers four factors, with scoring based on a holistic view of the achievement level across all four factors. The Process Item and Results Item Scoring Guidelines are presented as scoring continuums with 5-point increments.

The Index of Key Terms includes key terms from cover-to-cover of the Criteria booklet. The index is not exhaustive; it includes only those terms considered "key" to understanding the Baldrige Criteria and the Baldrige Program.

The three new terms added to the Glossary of Key Terms—"ethical behavior," "learning," and "segment"—have specific meaning and significance in a Baldrige assessment. To help users better understand these terms, they are defined and then described in greater detail. The descriptions of many other terms in the glossary also have been revised to align with the changes in the Scoring System and Scoring Guidelines.

If you wish to obtain a copy of the recently published 2004 Business Criteria, please contact the BNQP Office at 301-975-2036, or check out our Web site at [www.baldrige.nist.gov/Business\\_Criteria.htm](http://www.baldrige.nist.gov/Business_Criteria.htm).

The 2004 Education Criteria for Performance Excellence and the 2004 Health Care Criteria for Performance Excellence are currently being updated with these changes as well. The PDFs of the Education and Health Care Criteria will be available on the BNQP Web site by January 1 with hard copies available by January 13.

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## **2003 Baldrige Regional Conferences**

The 2003 Baldrige Regional Conferences were held in September in Cincinnati, Ohio, and in October in Scottsdale, Arizona. Over 350 representatives from the business, health care, education, and not-for-profit sectors attended the conferences to learn about the best practices of past and present Baldrige Award recipients. The following organizations presented at the conferences: Motorola's Commercial, Government & Industrial Solutions Sector; Branch-Smith Printing Division; SSM Health Care; Clarke American Checks; Pal's Sudden Service; Chugach School District; Pearl River School District; University of Wisconsin-Stout; Dana Corporation-Spicer Driveshaft Division; Sunny Fresh Foods; and Texas Nameplate Company.

We thank all of the Examiners and Award recipients who volunteered to be moderators and speakers at this year's conferences. In addition, we thank our cosponsors: the Greater Cincinnati Chamber of Commerce, the Arizona Quality Alliance, the Tennessee Center for Performance Excellence, and the Wisconsin Forward Award.

## **The Quest for Excellence® XVI**

The official conference of the Malcolm Baldrige National Quality Award, The Quest for Excellence (QE) XVI, will be held March 28-31, 2004, at the Marriott Wardman Park Hotel in Washington, D.C. This annual conference provides a forum for Award recipients to share their exceptional performance practices with worldwide leaders in business, education, health care, and not-for-profit organizations. QE XVI will showcase the 2003 Baldrige Award recipients. A pre-conference workshop for Baldrige beginners will be offered Sunday afternoon, March 28.

An advance registration fee of \$1,050.00 is available through March 1, 2004. Effective March 2, 2004, the registration fee will be \$1,200.00. Team and faculty discounts are available. Requests for registration information should be addressed to the American Society for Quality at 800-248-1946 (telephone) or [asq@asq.org](mailto:asq@asq.org) (e-mail). Complete conference information, including on-line registration, is available at [www.baldrige.nist.gov/Quest\\_for\\_Excellence.htm](http://www.baldrige.nist.gov/Quest_for_Excellence.htm).

Rooms have been reserved at the Marriott Wardman Park Hotel at the special conference rate of \$213 (single or double). In order to receive this special conference rate, please reserve rooms before February 27, 2004, and be sure to mention The Quest for Excellence XVI. You may reserve rooms by calling the Marriott Wardman Park Hotel at 202-328-2983. If you wish to receive a conference brochure, please call the BNQP Office at 301-975-2036.

The National Institute of Standards and Technology (NIST), the American Society for Quality, the American Society for Training and Development, and the Association for Quality and Participation cosponsor the conference.

## **New Foundation Officers**

The Foundation for the Malcolm Baldrige National Quality Award has announced that its President until the 2004 Ceremony is Dr. John A. White, Chancellor at the University of Arkansas, and its Vice President is Mr. Dale Crownover, President and CEO of Texas Nameplate Company, a Baldrige Award recipient in 1998.

## **In Sympathy**

The Baldrige Program staff wishes to express our sympathy to the family and colleagues of Joe Magliochetti, Chief Executive Officer for Dana Corporation, who passed away this fall. Joe, a member of the Baldrige Foundation's Board of Trustees and Board of Directors, was a strong advocate of the Baldrige Criteria. He was instrumental in continuing the use of the Dana Leadership Quality Program, an internal management system that is based on the Baldrige Criteria. We appreciate his many contributions and will miss him.

We also have received word of the recent death of John Flueck, Examiner with the Baldrige Program from 1995-1996. John coestablished the Department of Statistics at Temple University and the Statistics in Sports Section of the American Statistical Association. He moved to Las Vegas in 1989 to become Director of the Environmental Statistics and Modeling Division at Harry Reid Environmental Research Center. We are grateful for John's contributions to and support of the Baldrige Program and extend our sympathy to his family and colleagues.

## **Put on Your Ambassador Hats: Encourage a Colleague to Join the Board**

Examiners often tell us that they first heard about joining the board from a colleague. Accordingly, we look to you for help in our Examiner recruitment efforts as we try to increase the size of our board to accommodate the upward surge in Award applications. If you know of colleagues who would make good Examiners, please encourage them to apply.

As always, Category coverage and balance are important factors in maintaining a strong Board of Examiners. This year, we are actively seeking Examiners with expertise in finance, the hospitality industry, and transportation. Other areas of need are the utility industry, K-12 education, health care, large



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manufacturing, small business (manufacturing and service), government, and not-for-profit. Also, there is a need for individuals with senior management experience.

To assist you in your efforts, we recently sent a recruitment message with a link to the on-line Examiner application. We encourage you to pass this message along to your colleagues, and we thank you in advance for helping to spread the word about this wonderful opportunity.

### **Update Your Contact Information Before the 2003 Ceremony**

We anticipate a winter 2004 date for the Ceremony honoring the 2003 Malcolm Baldrige National Quality Award recipients. All Examiners will be notified by e-mail (or fax if they do not have e-mail) as soon as we have information from the White House on the date. Please be sure to notify Kimberly Lowery of any changes in your e-mail, fax, or address. Kim can be reached at [kimberly.lowery@nist.gov](mailto:kimberly.lowery@nist.gov) or 301-975-8070. The Examiner hot line for 2003 Ceremony information is 301-975-8787.

Members of the Board of Examiners will be invited to all major events held in conjunction with the Ceremony. An Examiner's spouse or friend may be invited to the reception that takes place the night before the Ceremony and to the Examiner Recognition Ceremony only.

### **Letters of Appreciation**

Harry Hertz, BNQP Director, would like to write a letter of appreciation to the employer of each member of the 2003 Board of Examiners. The letter will acknowledge the Examiner's contributions and commitment as well as the employer's support for the Baldrige process. If you would like a letter of appreciation sent to someone in your organization, please send a "fax" to Jenny Davis (301-975-4967) or an e-mail message ([virginia.davis@nist.gov](mailto:virginia.davis@nist.gov)) with your name and the name, title, and complete address of the person to whom you would like Harry to write.

### **Examiner Ambassador Activities**

The following Examiners or former Examiners reported outreach efforts between early April and late October: Leonard Deneault (2), Clive G. Monjo (4), Suresh Nirody, and Michael J. Novak. In addition, the following Examiners (including Alumni and former Examiners) requested the portable exhibit and/or outreach materials: Daniel Barton, Judith I. Brooks, Kathy Free, Jackie Hall, Pat Nahas, Robert Scanlon, Rosemarie Stocky, and Mike Strong. We thank all of these ambassadors for their outreach activities on behalf of the Program. If you have conducted outreach efforts

on behalf of the Program and wish to be recognized, report your activities to our Outreach and Communications Team via fax at 301-948-3716 or e-mail at [nqp@nist.gov](mailto:nqp@nist.gov).

### **Baldrige Office On the Road**

Baldrige staff frequently address a number of different conferences and assist with celebrations and conferences associated with presenting state and local program awards to recipients. For example, some recent state award events have included those in Virginia, Colorado, Iowa, Kansas, and Nevada. Recent conferences where Baldrige staff have spoken include the Balanced Scorecard North American Summit, National Quality Education Conference, Decision Sciences Institute Annual Meeting, and Institute for Healthcare Improvement National Forum. Upcoming events where BNQP is exhibiting are the American Council on Education, February 28-March 2, 2004, in Miami Beach, Florida; American College of Healthcare Executives Congress, March 1-4, 2004, in Chicago, Illinois; Association for Supervision and Curriculum Development Annual Conference and Exhibit Show, March 20-22, 2004, in New Orleans, Louisiana; and Conference on Quality in the Space and Defense Industries, March 22-23, 2004, in Cape Canaveral, Florida. You can keep track of future events where BNQP will be presenting or exhibiting by going to our Web site at [www.baldrige.nist.gov/BNQP\\_Exhibit\\_Schedule.htm](http://www.baldrige.nist.gov/BNQP_Exhibit_Schedule.htm).

### **Baldrige Team Changes**

As it does every year, the Baldrige Program offers staff the opportunity to rotate among its self-managed teams to provide opportunities for cross-functional learning and knowledge sharing. Five staff members rotated teams this year. Jackie DesChamps left the Award Process Team and joined the Administrative Support and Electronic Information Team; Bob Fangmeyer moved from the Administrative Support and Electronic Information Team to the Award Process Team; Rachel Kinney moved from the Outreach and Communications Team to the Management Team; and Jane Poulter moved from the Management Team to the Outreach and Communications Team. In addition, Jacqueline Calhoun left the Publications Management Team to begin a one-year rotation as the Baldrige Program's representative to NIST's Program Office. The NIST Program Office performs a wide variety of staff support for the NIST Director and Deputy Director and provides developmental opportunities to selected NIST staff. The Program Office also works closely with the

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Operating Units and other key organizations supporting the Director.

In addition to these changes, teams have elected their team leaders for FY 2004. Team leaders act as team coordinators and policy advisors for BNQP. They serve on the BNQP Coordinating Council along with BNQP management to facilitate communications and decision making among teams and to identify and coordinate policies for the office. Serving as a team leader is seen as a growth opportunity for staff members and allows BNQP to benefit from new and diverse viewpoints. The Award Process Team has elected as their team leader Mark Shapiro (301-975-3621), and Jackie DesChamps (301-975-3771) will serve as team leader of the Administrative Support and Electronic Information Team. The following staff members will continue to serve as team leaders: Melissa Pollack, Examiner and Staff Development Team (301-975-8950); Marti Jackson, Publications Management Team (301-975-4453); and Denise Coursey, Outreach and Communications Team (301-975-8274).

## Staff Changes—NIST

**Cassandra Ellis**, student on the Administrative Services/Electronic Information Team since March 1999, accepted a position as Information Activities Clerk on the Outreach and Communications Team in August 2003. Her responsibilities include customer service-related activities. Working towards a bachelor's degree in Business Administration with a minor in Human Resource Management from University of Maryland University College, Cassie plans on graduating in December 2003. She enjoys spending quality time with her daughter, family, and friends. Cassie says her new position will allow her the opportunity to learn more about the Baldrige Program and to work with staff that she normally would not have had a lot of interactions with as a student. Her telephone number is 301-975-8558, and she may be reached via e-mail at [cassandra.ellis@nist.gov](mailto:cassandra.ellis@nist.gov). Congratulations Cassie!

**Leo Grassi** recently joined BNQP's Examiner and Staff Development Team as an Education Specialist. In April of this year, Leo completed 21 years of service in the U.S. Navy as a public health practitioner, instructional designer, and educator. While in a teaching capacity during his last assignment at the Naval School of Health Sciences in San Diego, he was involved with using the California Awards for Performance Excellence Education Criteria and assisted the school in its self-assessment process.

Leo has a bachelor of science degree in Workforce Education, Training, and Development from Southern Illinois University and a master's degree in Education Technology from National University in San Diego. He is currently a doctoral candidate at Capella University, specializing in Instructional Design for On-line Learning. You can reach Leo at 301-975-2001 or by e-mail at [leo.grassi@nist.gov](mailto:leo.grassi@nist.gov).

**Kimberly Lowery** began in November with BNQP's Administrative Services/Electronic Information Team where she serves as an Administrative Support Assistant. Kim comes from NIST's Process Measurements Division of the Chemical Science and Technology Lab (CSTL). She worked there as a group secretary since January 2002. In August 2003, Kim was detailed to the CSTL Laboratory Office, where she served as the secretary to the Acting Deputy Director. She is completing her associate's degree at Frederick Community College this winter and will be finishing her bachelor's degree in Business Administration at the University of Maryland. In her free time, she enjoys touring the area, learning about local history, and taking digital photography. Kim looks forward to the experience she can gain from the Baldrige Program and assisting other teams throughout the Award process. Her telephone number is 301-975-8070, and she may be reached via e-mail at [kimberly.lowery@nist.gov](mailto:kimberly.lowery@nist.gov). Welcome Kim!

## Update

The official newsletter for the Board of Examiners of the Malcolm Baldrige National Quality Award.

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